Projectmates

MONTCLAIR STATE UNIVERSITY

Projectmates User Guide

for

Montclair State University

Facilities Construction Projects

Systemates, Inc.

Dallas, Texas

214.217.4100

www.montclair.edu/projectmates

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Table of Contents

1. Navigation Overview 4
2. Document Management & File Sharing 6
   File Structure Overview 6
   Uploading Documents 7
3. Project Initiation 8
   Project Information Fields 8
   Adding Users 9
   Original PCE 10
   Loading the PCE into Projectmates 11
   Projected Final PCE 12
4. Pre-Design & Design 14
   Pre-Design and Design Documents 14
   Photo Albums 14
   Discussion Forums 14
   Schedules 15
5. RFI & Submittal Setup 16
   RFI Setup 16
   Submittal Setup 17
6. Construction Phase 18
   RFIs 18
   Submittals 19
   Submittal Register (Optional) 20
   GC Daily Field Reports 20
   PM Field Reports 20
   Photo Albums 21
   Meeting Minutes 21
7. Construction Finances 22
   PCE 22
   Contracts 22
   Proposed Change Orders 24
   Change Orders 25
   Invoices & Pay Applications 27
   Credit Card Tracking 29
   Capital Budget Transfer 31
8. Code Services 34

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Code Services Documents 34
Plan Review / Permit Submittal 34
Inspection Requests & Responses 38
Ongoing Inspections 41
9. Project Closeout 43
Punch List 43
10. Other Goodies 44
Progress Pictures on Project Home Page 44
Global Ball in Court 45

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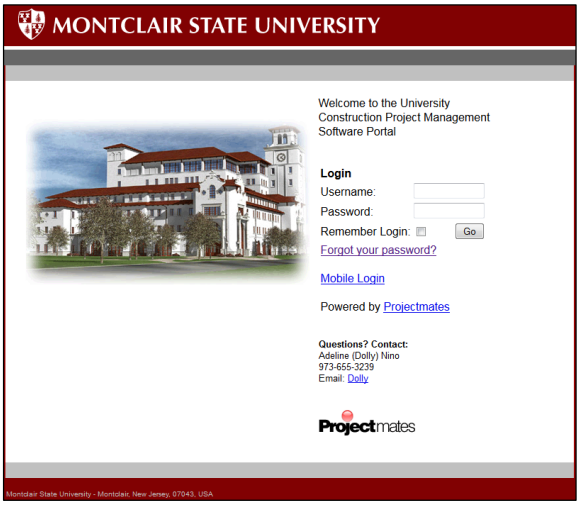
1. Navigation Overview

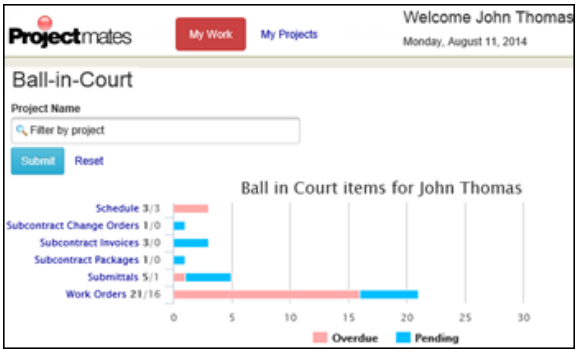


Log into your Projectmates software site

- Open Internet browser, go to **www.montclair.edu/projectmates**
- Enter USERNAME and PASSWORD (Usernames and passwords are CaSe SeNsItIvE) **For MSU employees, use your University Net-ID for username and password.**
- Follow the onscreen instructions to allow pop-up windows.
- A list of your projects will be displayed.

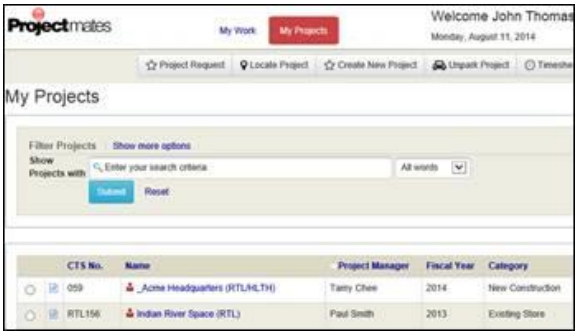
Forgot your password?

- Click on the **Forgot your password?** link. Type your username and click **GO**. Your username and password will be emailed to you within a few minutes.
- If you do not have a login ID, contact your Projectmates Site Administrator listed on the homepage.



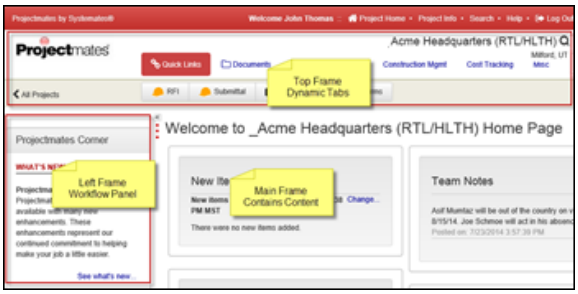
My Work

- Shows your Global Ball in Court. All pending and overdue items will be displayed on this screen.
- Items on this screen are color coded.



My Projects

- Select a project and click the "Open" button OR Click on the project name; you are taken to the selected project where you may begin your work.



- Once inside a project, information is organized into three frames for easy navigation.
- The tabs at the top are for navigating through the various workflow utilities and documents within the system, such as **Construction Mgmt** & **Tasks.** Choose the tab, and the respective modules will appear below. Click on each utility button to access the sub menus, which display in the Left Frame.
- **Project Leapfrogging:** Once inside a project, click the project name or magnifying glass located in the top-right corner to navigate quickly to another project.

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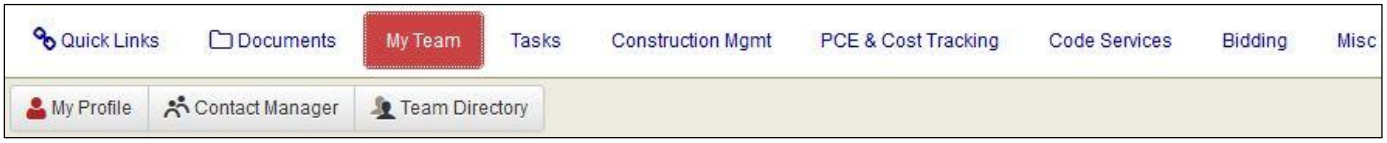
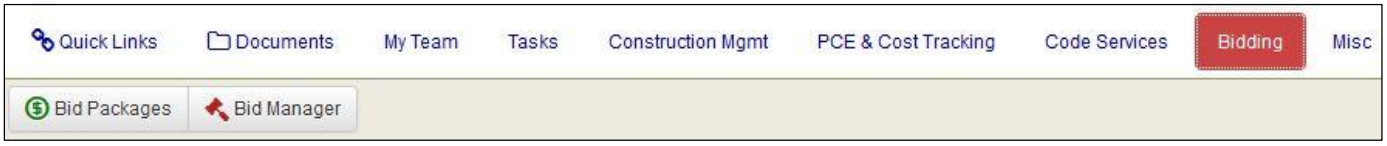
Projectmates Navigation

File Sharing





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2. Document Management & File Sharing

File Structure Overview

Access to document folders varies from user to user. Your view may differ from the view below.

Documents > Pre-Design

Documents > Design

Documents > Procurement Docs

Documents > Construction

Documents > Close Out

1 - As-Built Drawings
2 - Drawings of Record
3 - Owner Manuals
4 - Warranties
5 - Close Out Forms
6 - Cert of Occupancy
7 - Final Inspections
8 - Attic Stock List

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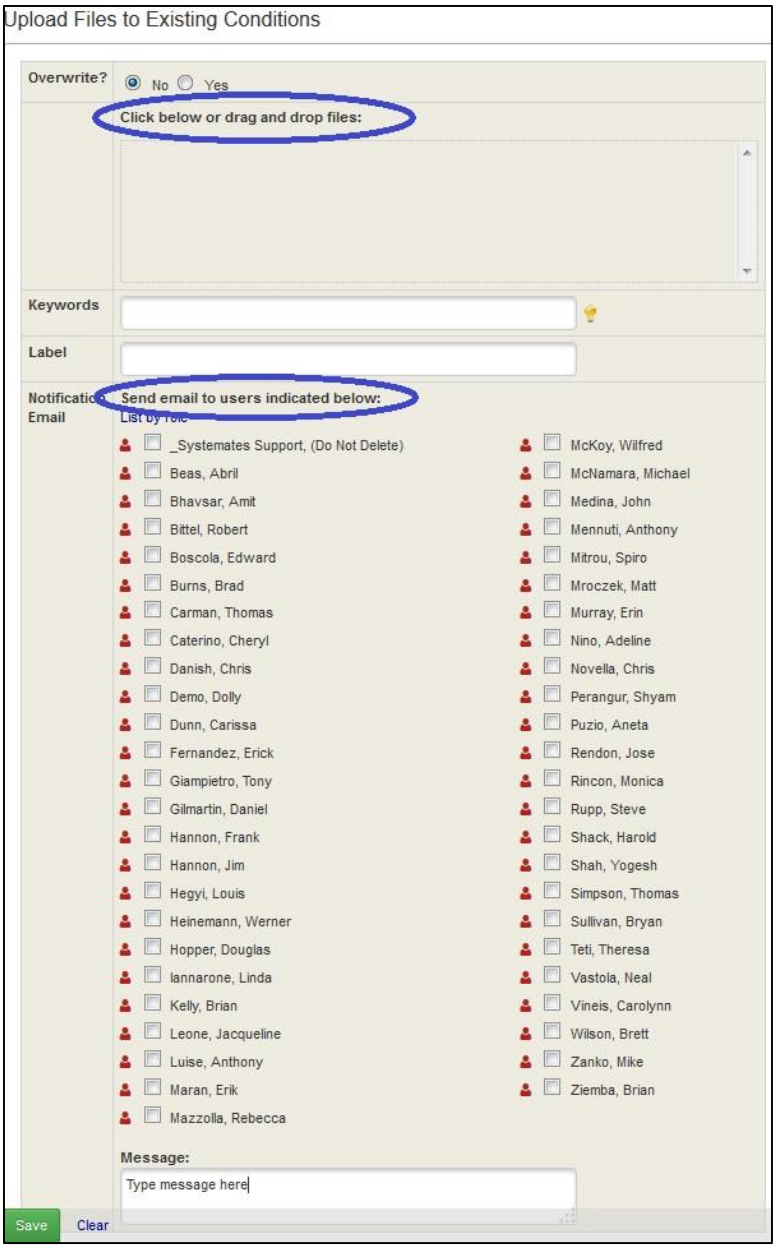
Uploading Documents

- Click on **Upload** icon next to the file folder.

- In the upload window:
  - Drag and drop files or right click in the box to choose files.
  - Notify appropriate parties that documents are uploaded.
- Click **Send**.



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3. Project Initiation

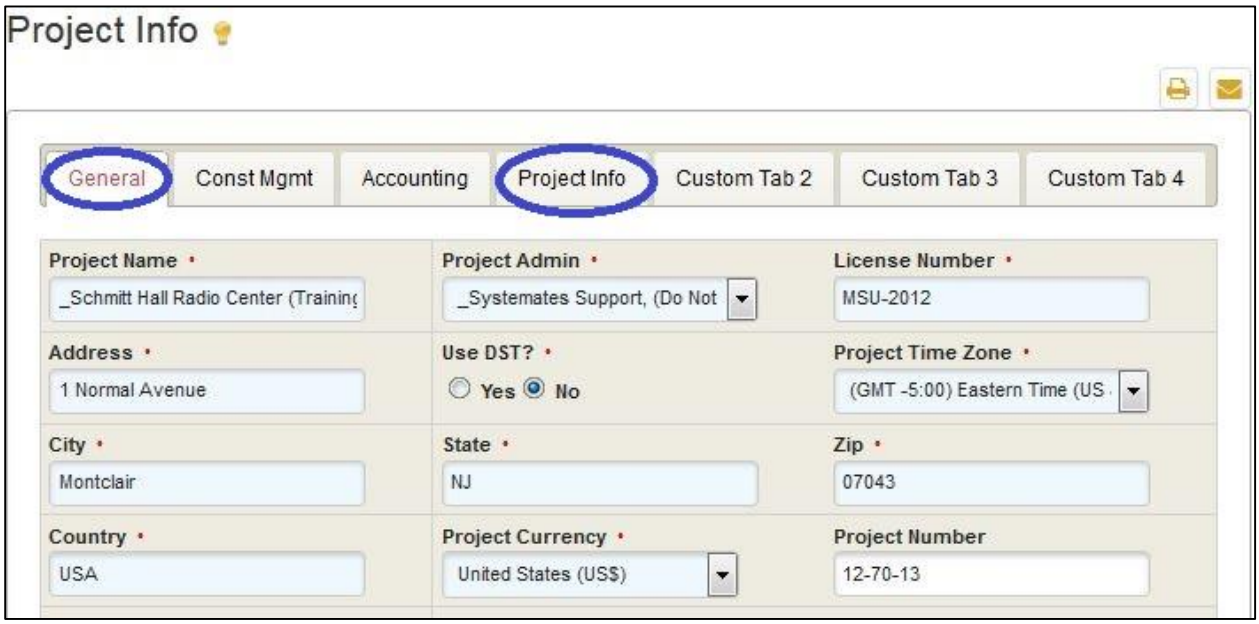
Once a project has received Presidential approval or similar authorization for emergency and compliance projects, a Projectmates Site Administrator will create that project in the software with all relevant metadata (project name, number, type, approved PCE value, etc). For projects approved during the annual budget call process, this will occur once the Controller's Office and Budget Office establish the funding source(s) and set up an account in the University's Financial Management System (FRS).

Project Information Fields

Inside each project, project information fields store project-related data such as project type, fiscal year, current phase, and project manager. Verify and update the information inside the project.

- From within the project, click on Project Info located in the top right corner to update the fields pertaining to this project.

- Verify and update the project info as needed on the **General** and **Project Info** tabs.
- Click



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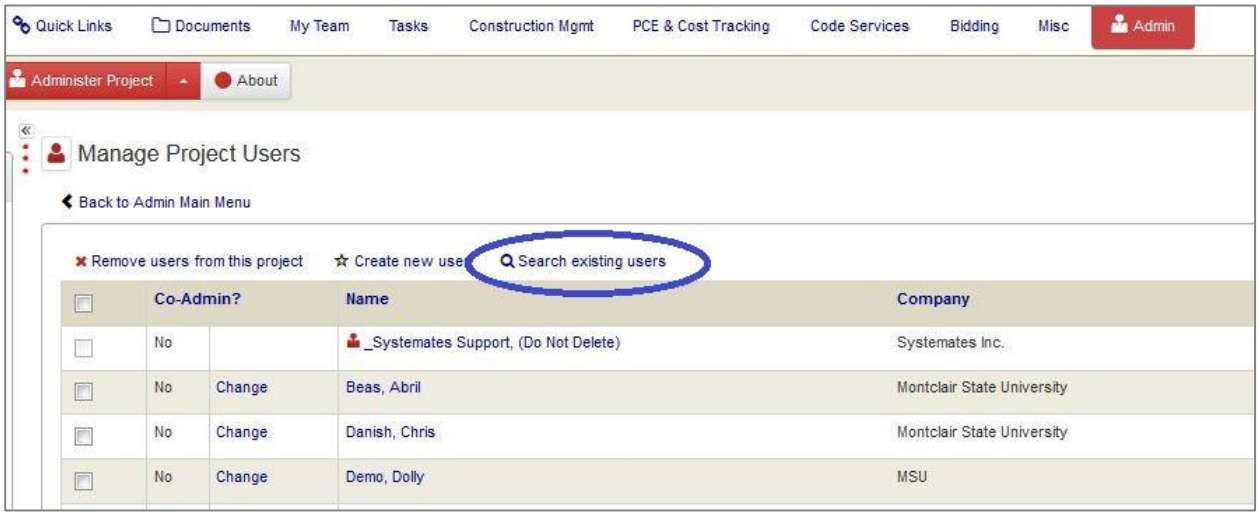
Adding Users

Throughout the project, you can add or remove existing users to your specific project(s). Always search first to check if a person has a user account set up in Projectmates.

Admin Tab > Administer Project > Project – Users

- In the search box provided, enter in the user's name or company and click on Search
- The filter will display existing users with the matching criteria. Select the user(s) and click on Add
- Repeat as necessary to build your project user team.



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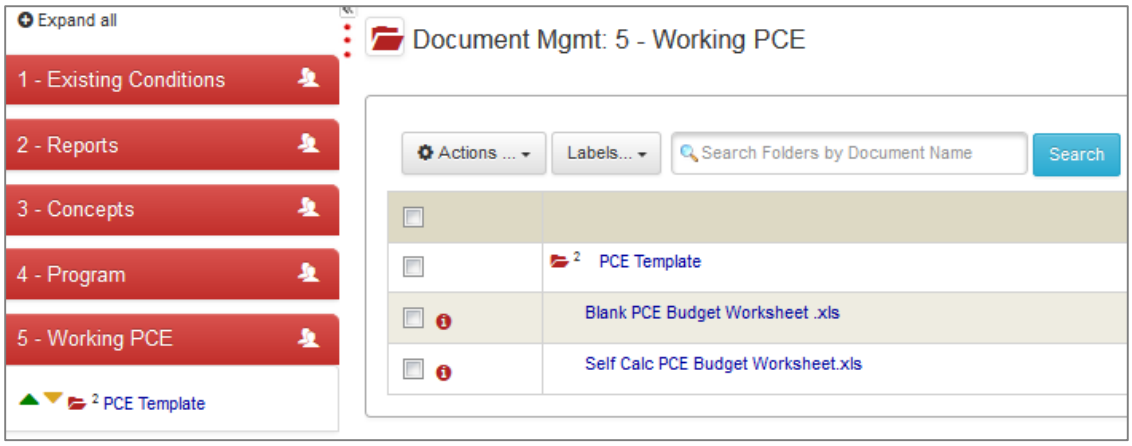
Original PCE

The Project Manager is responsible for setting up the PCE in Projectmates budget module.

Documents > Pre-Design > 5 – Working PCE > PCE Template

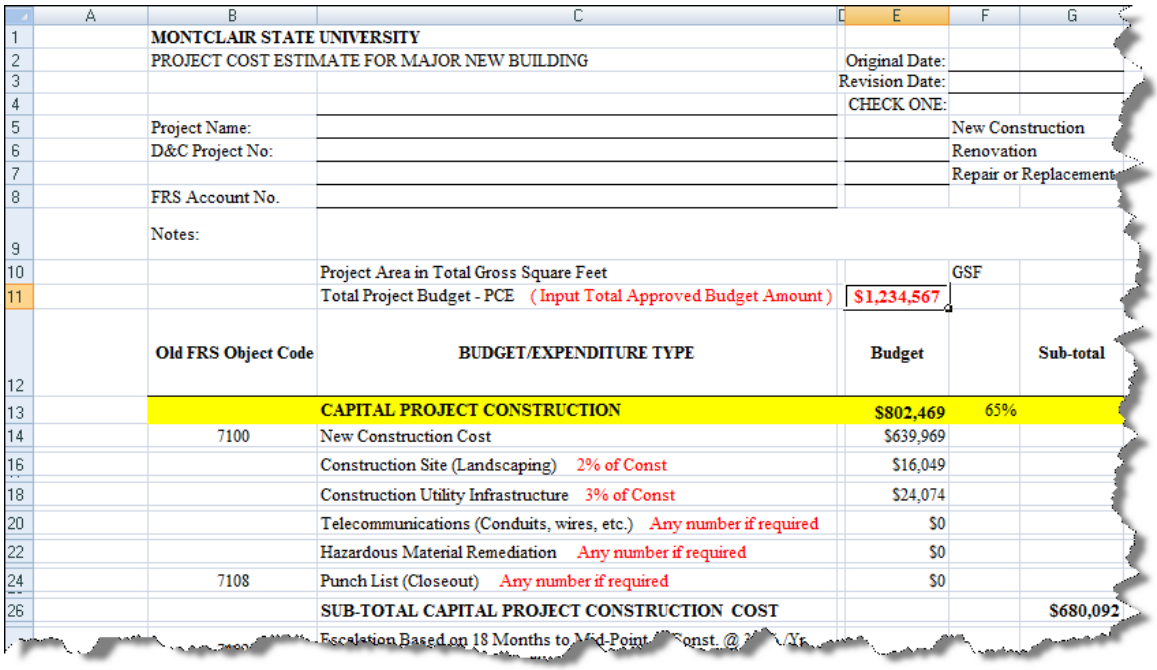
Option 1: Download the document "Self Calc PCE Budget Worksheet" located in the folder. This Excel file contains all the PCE line items.



- Add Total Project Budget - PCE dollar amount.
- Once the PCE is complete, **Save** the Excel file locally for import into the budget module.

The Excel document contains all PCE line items and is formatted to upload easily into Projectmates.

Option 2: Download the file called “Blank PCE Budget Worksheet.xls” and manually populate the values to get a total PCE. Save the Excel file for import into the budget module as described above.



	A	B	C	D	E	F	G
1		**MONTCLAIR STATE UNIVERSITY**					
2		PROJECT COST ESTIMATE FOR MAJOR NEW BUILDING			Original Date:		
3					Revision Date:		
4					CHECK ONE:		
5		Project Name:				New Construction	
6		D&C Project No:				Renovation	
7						Repair or Replacement	
8		FRS Account No.					
9		Notes:					
10			Project Area in Total Gross Square Feet			GSF	
11			Total Project Budget - PCE (Input Total Approved Budget Amount)		$1,234,567		
12		**Old FRS Object Code**	**BUDGET/EXPENDITURE TYPE**		**Budget**		**Sub-total**
13			**CAPITAL PROJECT CONSTRUCTION**		**$802,469**	65%	
14		7100	New Construction Cost		$639,969		
16			Construction Site (Landscaping) 2% of Const		$16,049		
18			Construction Utility Infrastructure 3% of Const		$24,074		
20			Telecommunications (Conduits, wires, etc.) Any number if required		$0		
22			Hazardous Material Remediation Any number if required		$0		
24		7108	Punch List (Closeout) Any number if required		$0		
26			**SUB-TOTAL CAPITAL PROJECT CONSTRUCTION COST**				**$680,092**
			Escalation Based on 18 Months to Mid-Point Const. @ /Yr.				

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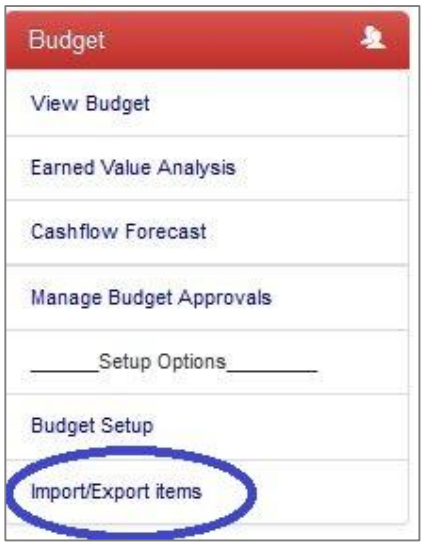
Loading the PCE into Projectmates

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Budget > Import/Export Items

1. Click "Import/Export items" from the Budget Setup Options.



2. Click on Browse.
3. Search and select the completed template.
4. Check "Delete all existing items"
5. Click on Import.

6. Once the import has been complete, a confirmation message will be display.

7. Click on View/Edit Budget to view and verify.

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Projected Final PCE

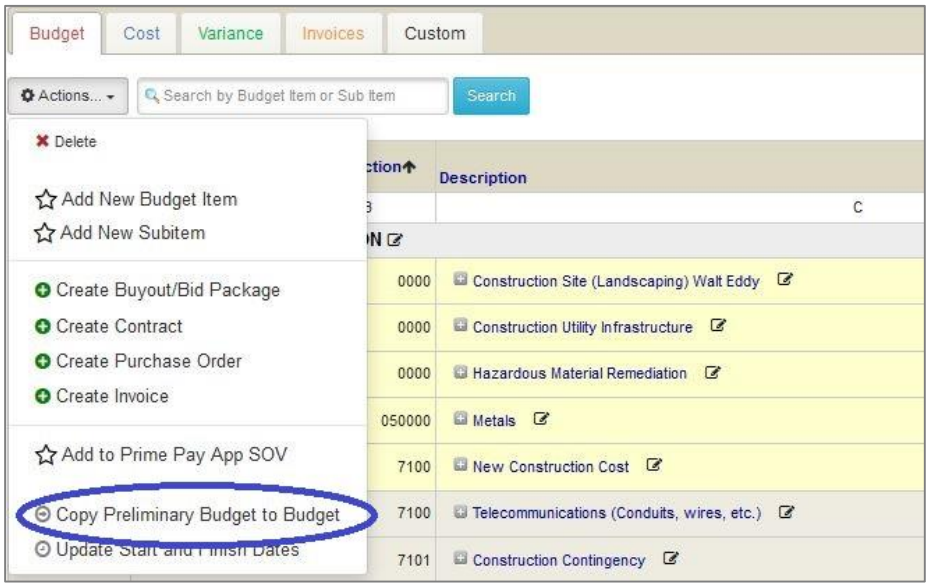
MSU Workflow

- Project Manager reviews the Original PCE with Facilities AVP/Fiscal Agent for approval.
- Once the Projected Final PCE is approved, this information is emailed from Projectmates to the Finance & Treasury Controller for update in the Finance Management System.

Setup in Projectmates

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Budget >

- From the budget, click View/Edit Budget.
- Select the checkbox next to Group to select all items.
- Click the Actions dropdown menu and select Copy Preliminary Budget to Budget.
- All Original PCE values will now display in Projected Final PCE.



1. To edit line items, click the expand icon to view all subitems.

2. After the subitems have been expanded, click the edit icon . It will then open in edit form.

1.0 CAPITAL PROJECT CONSTRUCTION
0000 Construction Site (Landscaping) Walt Eddy
0000 Construction Utility Infrastructure
0000 Construction Utility Infrastructure

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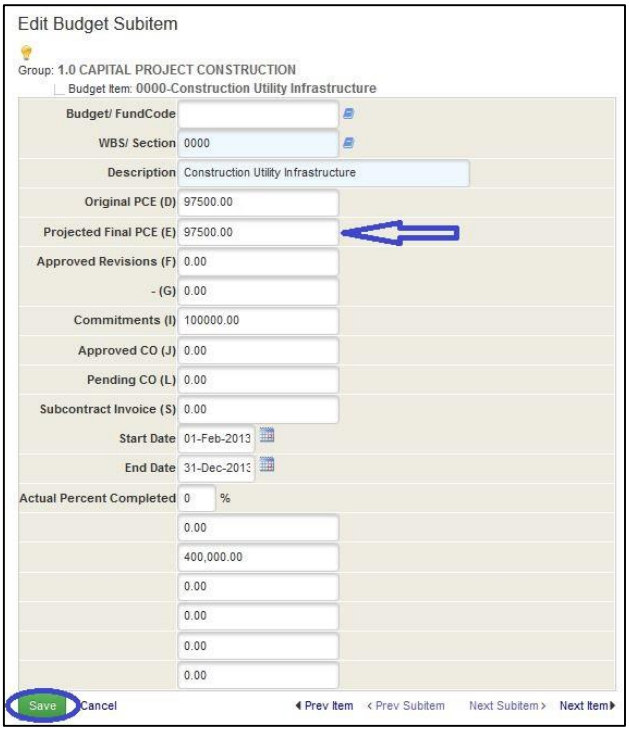
3. The Edit Budget Item window will appear. Make any necessary changes/updates, then click Save.

   Enter values into "Projected Final PCE (E) "

   A confirmation will appear

4. Close the Edit window and repeat with other subitems as necessary.



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4. Pre-Design & Design

Pre-Design and Design Documents

Pre-design and design document folders been configured to give internal MSU staff and external consultants, architects, and engineers various degrees of access to documents.

Documents > Pre-Design

Documents > Design

Photo Albums

Quick Links Tab > Photos > Existing Conditions

- **Existing Conditions:** The Project Manager can upload photos taken onsite to show existing conditions prior to construction. There are default albums for Exterior and Interior photos; additional albums can be created as needed.

Discussion Forums

Discussion Forums are one of the simplest, most effective ways of enabling team members to communicate without the hassle of long-running email correspondence. Use Discussion Forums to conduct topic-based discussions.

Tasks Tab > Discussion Forum > *Select Appropriate Thread*

- **Design Coordination:** Internal MSU people and external architects and engineers can use this forum for general discussions during design phase.

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- **Project Coordination:** Internal MSU people, external architects and engineers, and contractors have access to this forum. Best for communication involving internal and external project team members.

Schedules

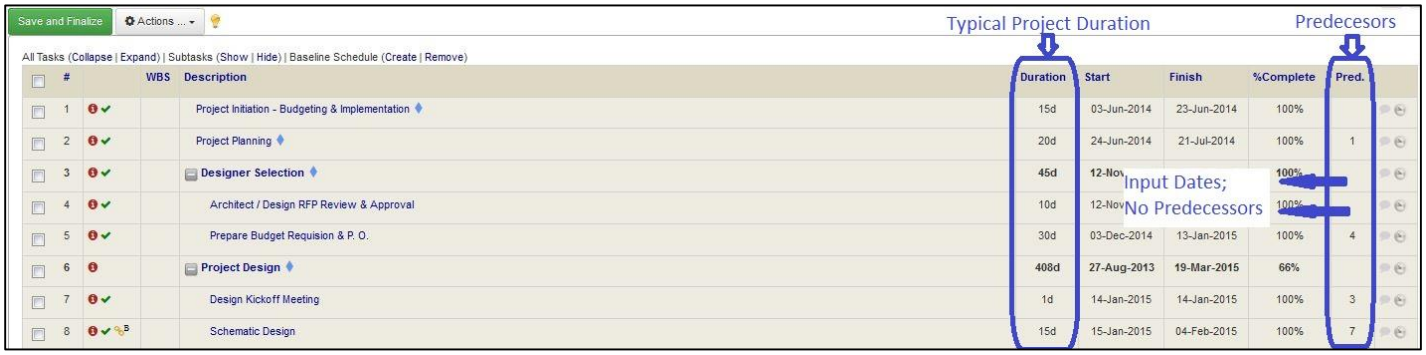
Tasks Tab > Schedule > *Select Appropriate Schedule*

Milestones - New Construction and **Milestones - Renovation** (depending on project type): This is MSU's overall project milestone schedule. There is a schedule prepared for the project team that should be updated throughout the lifecycle of the project (Initiation, Architect Selection, Construction, etc.)

Predecessors and typical project durations have been configured for most tasks for ease of use. The Project Manager only needs to update tasks that do not have predecessors.

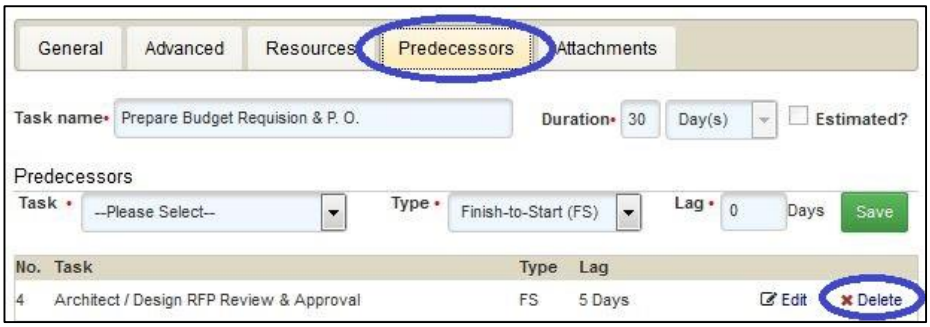
At the start of the project, the project manager adjusts the schedule to reflect planned dates.

- Do not add or remove milestones since milestones are reported across all projects.
- Update planned start and planned finish dates when you are added to the project or as soon as possible. ***
- Update actual start and actual finish dates as milestones are complete.


Save and Finalize
Actions ...
All Tasks (Collapse | Expand) | Subtasks (Show | Hide) | Baseline Schedule (Create | Remove)
Typical Project Duration
Predecesors
Input Dates;
No Predecessors
WBS Description Duration Start Finish %Complete Pred.
1 Project Initiation - Budgeting & Implementation 15d 03-Jun-2014 23-Jun-2014 100%
2 Project Planning 20d 24-Jun-2014 21-Jul-2014 100% 1
3 Designer Selection 45d 12-Nov 100%
4 Architect / Design RFP Review & Approval 10d 12-Nov 100%
5 Prepare Budget Requision & P. O. 30d 03-Dec-2014 13-Jan-2015 100% 4
6 Project Design 408d 27-Aug-2013 19-Mar-2015 66%
7 Design Kickoff Meeting 1d 14-Jan-2015 14-Jan-2015 100% 3
8 Schematic Design 15d 15-Jan-2015 04-Feb-2015 100% 7

***Predecessors have been created in the schedule. Updating one task should update all other tasks dates based on predecessor relationships. However, there may be times when you need to break a predecessor and manually enter in a date.

- Click on the task name.
- Click the **Predecessors** Tab
- Click the **Delete** link.
- Click the **General** Tab.
- Input "Planned Start" and "Planned Finish" dates.
- Click Save



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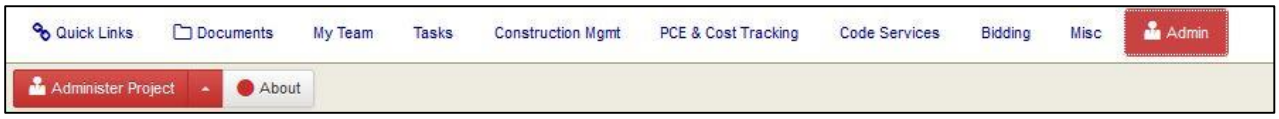
5. RFI & Submittal Setup

Construction Management Modules are the applications built within the Projectmates system for communication and job tracking in the construction field. These applications include RFI, Submittal, and Daily Field Reports.

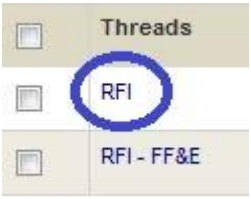
The Project Manager is required to setup RFI, Submittal, and Daily Field Report workflow per the project requirements. Setup is a simple process.



RFI Setup

MSU Workflow - External Architect is the first recipient. The Project Manager is copied on all RFIs.

1. Click **Request for Information.**



2. Click on the thread description.

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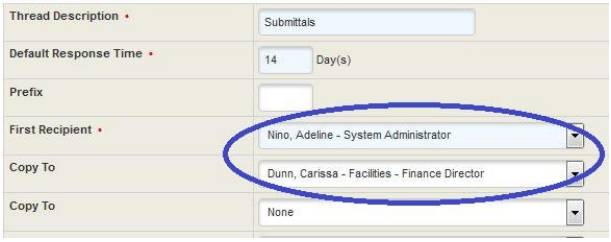
3. Select a **First Recipient from the drop-down.**
4. Select **Copy To** users from the drop-down.
5. Click **Save.**

Submittal Setup

MSU Workflow –External Architect is the first recipient. The Project Manager is copied on all Submittals.

6. Click **Submittal/Shop Drawing.**

7. Click on the thread description.



8. Select a **First Recipient from the drop-down.**
9. Select **Copy To** users from the drop-down.
10. Click **Save.**

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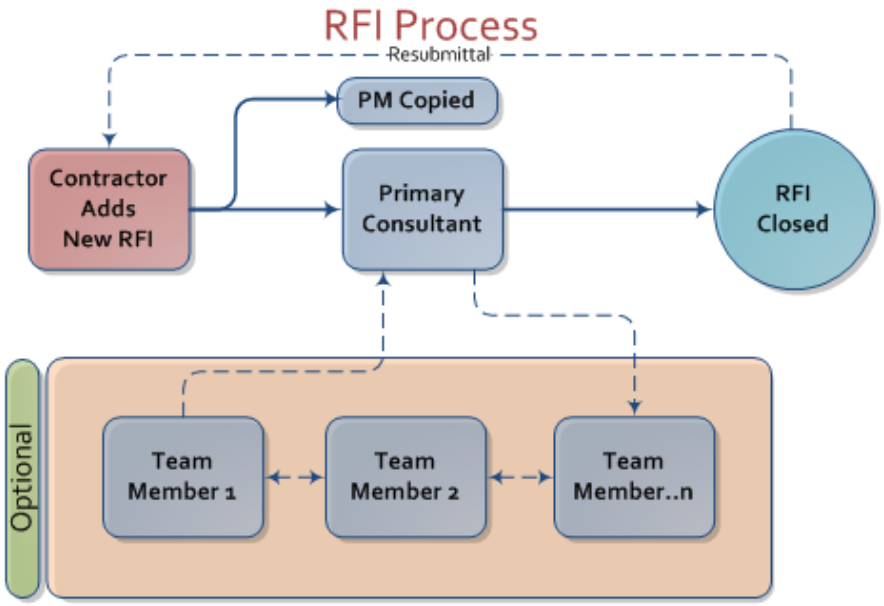
6. Construction Phase

Projectmates provides over 30 different modules out-of-the-box, making it one of the most complete construction project management products. Following is a list of the system tools the Project Manager will use most frequently during the construction phase.

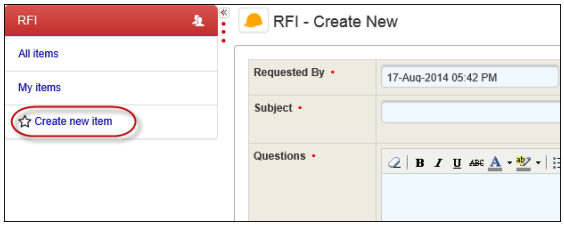
- Document Management / File Sharing
- Photo Albums
- Team Directory
- Discussion Forums
- Schedules
- Meeting Minutes
- RFIs
- Submittals
- Field Reports
- Punch Lists
- Budget
- Contracts
- Change Orders
- PCOs
- Invoices/ Pay Apps

RFIs

Construction Mgmt Tab > RFI > RFI



- Initiate an RFI by clicking **Create new item.** Complete the RFI form.



- Click on Save & Finalize
- View an existing RFI by clicking the RFI subject from the log page.
- Route an RFI to another person by clicking Route
- Close an RFI by clicking Close

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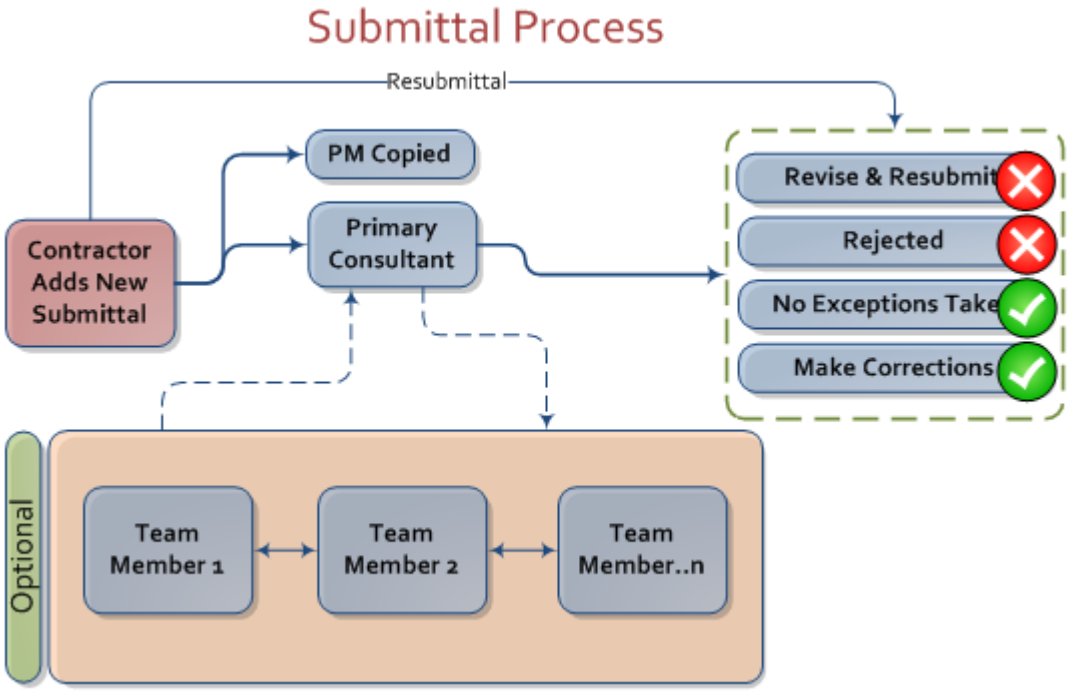
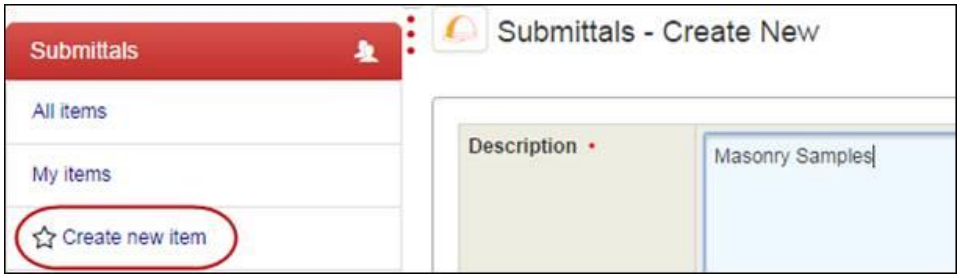
Submittals

Construction Mgmt **Construction Mgmt Tab > Submittal > Submittal**



- Initiate a Submittal by clicking **Create new item.** Complete the Submittal form.



- Click on Save & Finalize
- View an existing RFI by clicking the RFI subject from the log page.
- Route an RFI to another person by clicking Route
- Close an RFI by clicking Close

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Submittal Register (Optional)

In some cases, the GC furnishes a submittal schedule at the start of the project. If so, this submittal register can be imported through a Projectmates Excel template. The submittal register is used to predefine all needed Submittals during a construction project. The Project Manager can upload this master list into the submittal module to track the status of submittal items automatically.

You can prepare a list of submittals in an Excel spreadsheet and import the spreadsheet into Projectmates' Submittal Register.

To import submittal register items:

1. Click the **Import/Export register items** link.
2. The **Submittals Register – Import/Export Items** page displays.

3. Click the **Download MS Excel template** link.
4. Enter information in the template. Instructions are provided in the template.
5. Save the completed Excel template to your hard drive and return to Projectmates.

6. Click the **Browse…** button.
7. Locate the template you just created.
8. Click the **Import** button.

GC Daily Field Reports

Construction Mgmt Tab > Daily Field Report >

GC Daily Field Reports: General Contractor completes DFR and submits to Project Manager.

PM Field Reports

Construction Mgmt Tab > PM Field Report >

PM Field Reports: Project Manager completes the PM Field Report and submits to Facilities AVP/Fiscal Agent.

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Photo Albums

Quick Links Tab > Photos > *Select Appropriate Thread*

- **Construction Progress:** Albums are organized by week. The GC and Project Manager can upload photos taken onsite to show progress of construction. Additional albums can be created for longer jobs.
- **Completion Photos:** Designed for housing photos taken at project completion.

Meeting Minutes

Tasks Tab > Meeting Minutes > *Select Appropriate Thread*

- **Construction Meetings:** Document (weekly) jobsite meetings during construction.
- **Design Meetings:** Document meetings with architects or others during design phase(s).
- **Pre Design Meetings:** Document meetings pre design.

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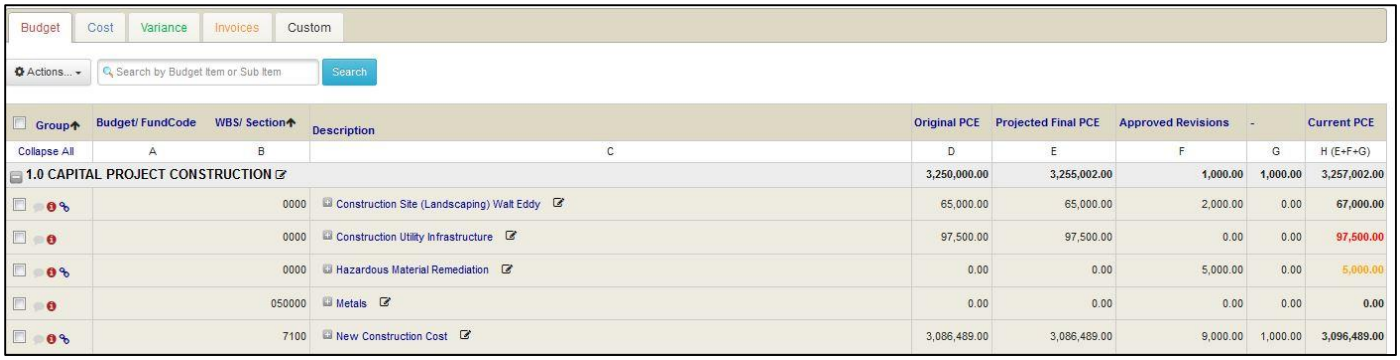
7. Construction Finances

PCE

The Project Manager is responsible for maintaining the PCE in the Projectmates budget module.

Reference Loading the PCE into Projectmates in this document for more information.

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Budget



Group	Budget/ FundCode	WBS/ Section	Description	Original PCE	Projected Final PCE	Approved Revisions	-	Current PCE
Collapse All	A	B	C	D	E	F	G	H (E+F+G)
1.0 CAPITAL PROJECT CONSTRUCTION				3,250,000.00	3,255,002.00	1,000.00	1,000.00	3,257,002.00
		0000	Construction Site (Landscaping) Walt Eddy	65,000.00	65,000.00	2,000.00	0.00	67,000.00
		0000	Construction Utility Infrastructure	97,500.00	97,500.00	0.00	0.00	97,500.00
		0000	Hazardous Material Remediation	0.00	0.00	5,000.00	0.00	5,000.00
		050000	Metals	0.00	0.00	0.00	0.00	0.00
		7100	New Construction Cost	3,086,489.00	3,086,489.00	9,000.00	1,000.00	3,096,489.00

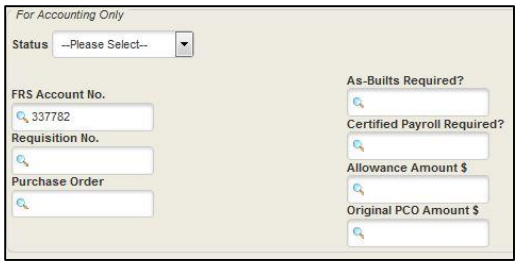
Contracts

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Contract

MSU Workflow

- Facilities Finance Admin inputs electronic version of contract into Projectmates once the Project Manager selects contractor and starts the approval process in Projectmates.
- Facilities Finance Admin enters Requisition for a Purchase Order in FRS as is done currently.
- Once PO processed in FRS, open the contract in Projectmates, attach any supporting documents, and enter the PO# into the accounting field.

Type YES or NO to indicate if Certified Payroll Required. Certified payroll is required for any contract that requires construction services.



The approval process for contracts is as follows:

1. Facilities – Finance Capital Budget Admin
2. Facilities - Project Manager

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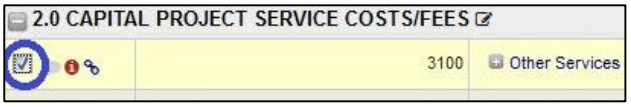
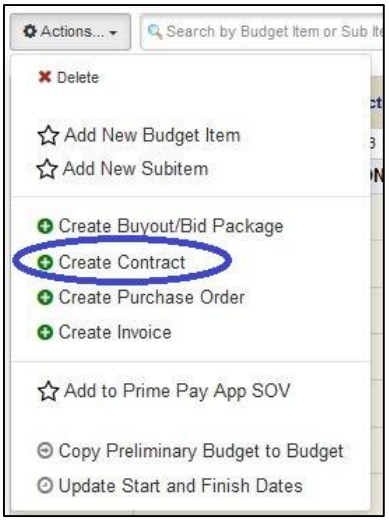
To create an electronic contract:

1. From the budget, select checkbox next to budget line item.



2. Scroll to top of budget. Click on the Actions menu dropdown and select **Create Contract.**



3. Type a Contract Description and click GO.

The contract page will open.

Create New Contract
Only the line items which are NOT linked to existing contracts will be included.
New Contract Description
Enter Contract Description
Go

4. Complete the contract information, including the following:

- Awarded To
- Scope of Work
- Original Substantial Completion Date (Details tab)
- Verify Line Items (Items tab)
- Attach PDF of executed PO (Attachments tab)

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5. **Input information into the ACCOUNTING fields** (General tab).

   Once the Purchase Order is assigned in the FRS system, that number should be added to the Purchase Order field.

6. Click **Start Approval** on the Approve tab.

Proposed Change Orders

PCE & Cost Tracking Tab > Contracts & COs > PCOs

MSU Workflow

- Contractor initiates PCO in Projectmates.
- Facilities Project Manager either approves or rejects PCO after s/he has had a chance to negotiate amount w/ contractor during weekly meeting.

The approval process for PCOs is as follows:

1. Facilities - Project Manager

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Change Orders

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Contract

MSU Workflow:

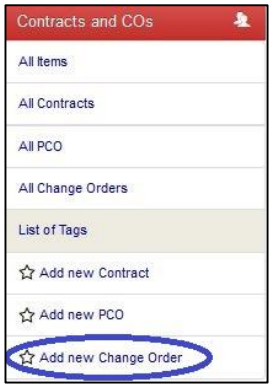
- Contractor or Facilities Project Manager enters the change order into Projectmates and then starts the electronic approval process.

The approval process for change orders is as follows:

1) External – CM/Architect/Engineer
2) Facilities - Project Manager
3) Facilities - Finance Director
4) Facilities - AVP/Fiscal Agent
5) Finance & Treasury - Capital Procurement

To create a change order:

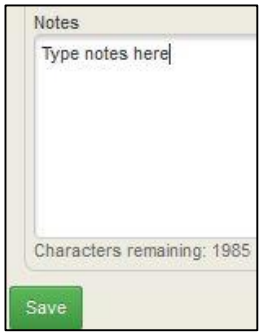
1. Click **Add new Change Order.**



2. Select the contract from the drop-down list. All contract information will be pulled into the change order.

3. Select a Reason Code from the drop-down.

4. **Reference PCOs in the Notes section.**
5. Click the **SAVE** button.



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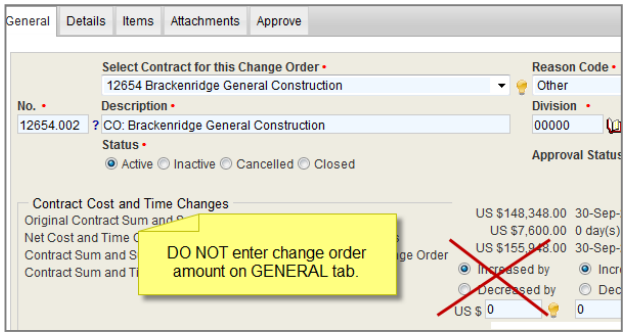
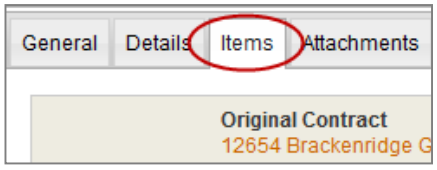
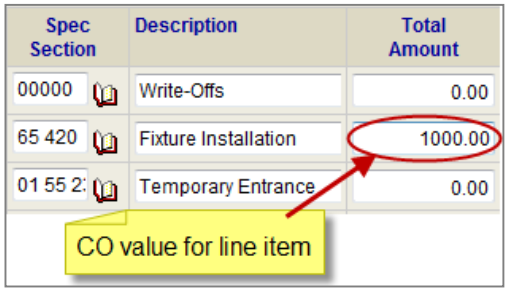
*Note: **DO NOT** enter change order amount ($) on the GENERAL tab. This will be entered under ITEMS tab next to specific line items in the contract schedule of values.*



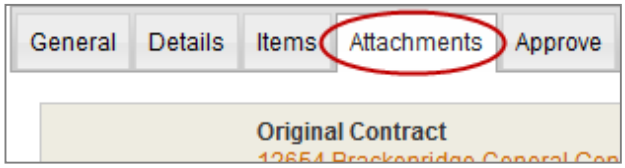
6. Jump to ITEMS tab.



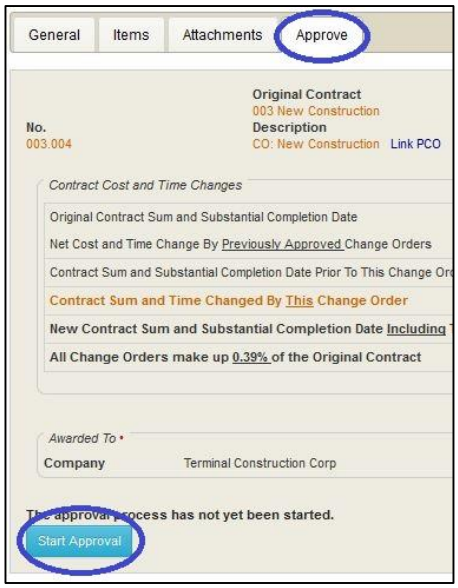
7. Enter in the change order amount next to the appropriate line item(s) in the contract schedule of values.
8. Click the **SAVE** button after entering all amounts.



9. Jump to ATTACHMENTS tab. Upload any backup documents.



10. Jump to APPROVE tab. When ready, click on **Start Approval** to begin the electronic approval process.


General
Items
Attachments
Approve
Original Contract
003 New Construction
No.
003.004
Description
CO: New Construction
Link PCO
Contract Cost and Time Changes
Original Contract Sum and Substantial Completion Date
Net Cost and Time Change By Previously Approved Change Orders
Contract Sum and Substantial Completion Date Prior To This Change Or
Contract Sum and Time Changed By This Change Order
New Contract Sum and Substantial Completion Date Including
All Change Orders make up 0.39% of the Original Contract
Awarded To
Company
Terminal Construction Corp
The approval process has not yet been started.
Start Approval

Invoices & Pay Applications

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Pay Requests

MSU Workflow for Invoices & Pay Applications

- Contractors, vendors, and other service providers enter pay requests into Projectmates.
- Approval occurs electronically within Projectmates
- After the Finance & Treasury - Capital Procurement approves the invoices and all other parties have approved, the invoice is sent to "Printer Friendly" view in Projectmates. Print approved pay request and give to AP department to process payment.
- Twice per week, Facilities Finance will review check run to see what check's AP has cut. Facilities Finance Admin will then input payment information directly into the invoice in Projectmates.

The approval process for invoices / pay applications is as follows:

1) Facilities - Project Manager

1a) External – CM / Architect – *as needed will get hard signatures*

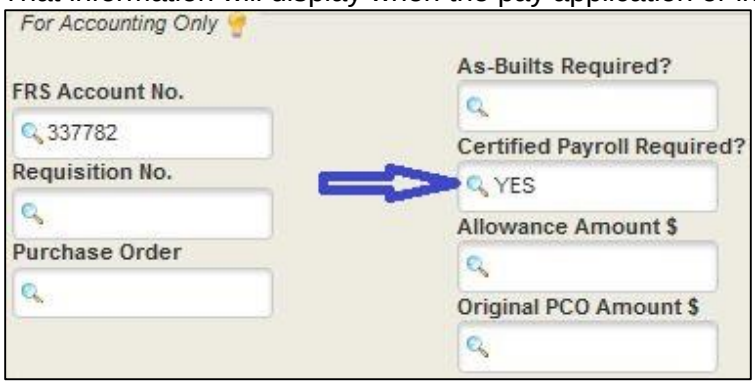
1) Facilities – Finance Capital Budget Admin

1) Facilities - AVP/Fiscal Agent

1) Finance & Treasury - Capital Procurement

Certified Payrolls

When the contract is setup in Projectmates, indicate if the contract requires certified payroll. That information will display when the pay application or invoice is entered in Projectmates.



- **If YES, Finance & Treasury – Capital Procurement** will verify certified payroll as part of approving.
- **If NO, Finance & Treasury – Capital Procurement** still needs to review and approve before printing and giving pay app or invoice to AP department to process payment.

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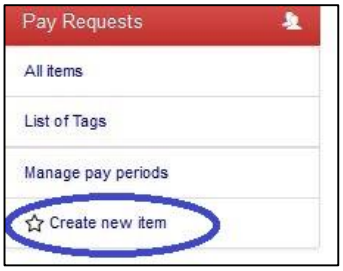
To create a invoice or pay application:

11. Click **Create new item.**



12. Select your contract from the drop-down list. All contract information will be pulled into the pay application.
13. Enter the Invoice or Pay Application number. Alternatively, click the question mark (**?)** icon and the number will populate for you.

14. Click **Specify custom pay** periods and then enter the Pay Period and % retainage (if applicable).
15. Click the **SAVE** button.

16. Jump to ITEMS tab.

17. Enter the work complete for this pay period next to the appropriate line item(s) in the contract schedule of values. This can be entered as dollar amounts or percentages.

Note: Any approved change orders will automatically show up in the ITEMS tab where you can invoice against them.

18. Click the **SAVE** button after entering all amounts.

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19. Jump to ATTACHMENTS tab. Upload any required backup documents.

- Certified Payrolls
- Copy of Approved Pencil Requisition
- Subcontractor Releases
- Timesheets & Reimbursables (if CM)

20. Jump to APPROVE tab. When ready, click on **Start Approval** to begin the electronic approval process.

Credit Card Tracking

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Budget

MSU Workflow for Tracking Credit Card Expenses

In Projectmates, the Facilities Finance Admin logs credit card invoice amounts directly into the budget. Examples of bills that are paid via credit card include FedEx.

1. To add a new budget subitem, select the checkbox next to the main budget item.

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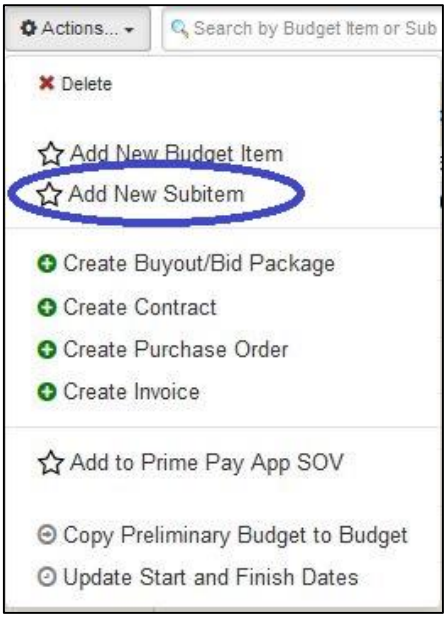
2. In the Action menu, click **Add New Subitem.**

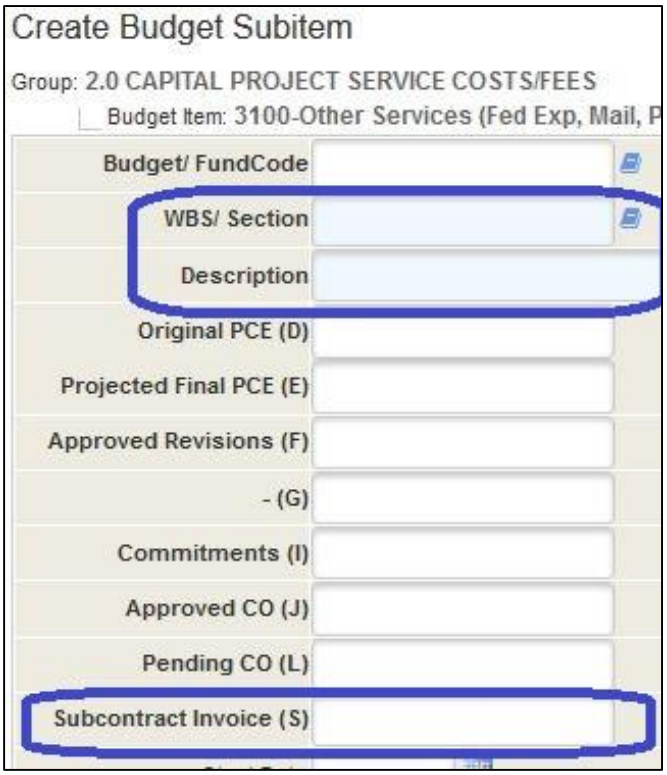


3. The Edit Budget Item window will appear.
4. Input WBS/Section, Description, and dollar amount.

   Enter dollar amount into "Subcontract Invoice (S) "
5. Click CREATE.

   A confirmation will appear

   Item saved successfully



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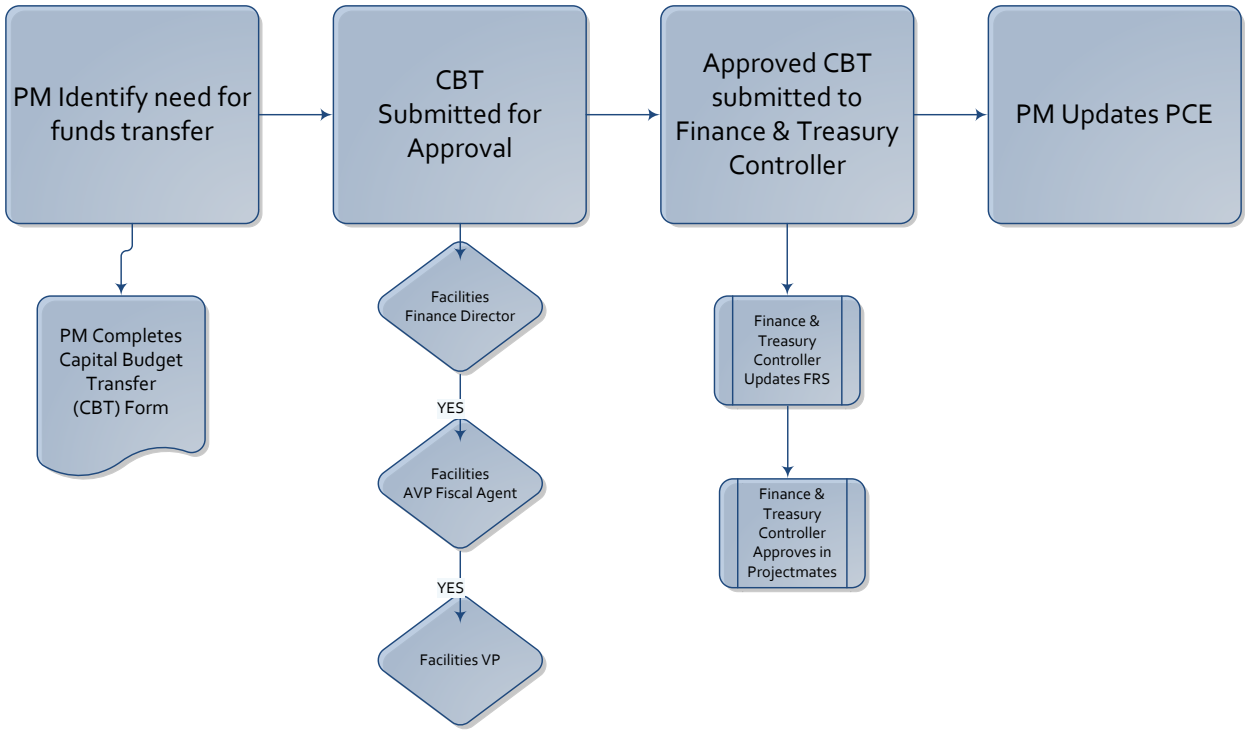
Capital Budget Transfer

PCE & Cost Tracking Tab > Capital Budget Transfer

MSU Capital Budget Transfer Process


PM Identify need for funds transfer
CBT Submitted for Approval
Approved CBT submitted to Finance & Treasury Controller
PM Updates PCE
PM Completes Capital Budget Transfer (CBT) Form
Facilities Finance Director
YES
Facilities AVP Fiscal Agent
YES
Facilities VP
Finance & Treasury Controller Updates FRS
Finance & Treasury Controller Approves in Projectmates

1) Facilities – Finance Director
2) Facilities - AVP/Fiscal Agent
3) Facilities - VP
4) Finance & Treasury - Controller

- View all CBT requests in Projectmates by viewing the CBT log.

No.	Date:	Fiscal Year:	Project FMS Account No.:	Transfer From Total:	Transfer To Total:	Status	Responsibility	
10	16-Jun-2014	2012	337782	1,000.00	1,000.00			Edit
9	27-Mar-2014	2012	337782	10,000.00	10,000.00	Pending-TRANSFER TO	(Do Not Delete) _Systemates Support	Edit
8	30-Oct-2013	2012	337782	1,154.87	1,154.87	Pending-TRANSFER TO	(Do Not Delete) _Systemates Support	Edit
7	30-Jan-2013	2012	337782	1,000.00	1,000.00	Pending-TRANSFER TO	(Do Not Delete) _Systemates Support	Edit

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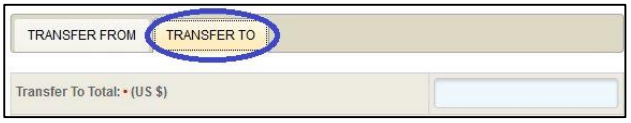
To initiate a new request for capital budget transfer:

1. Click **Create new item.**

2. Complete the necessary fields in the Transfer From tab.
3. Click SAVE.

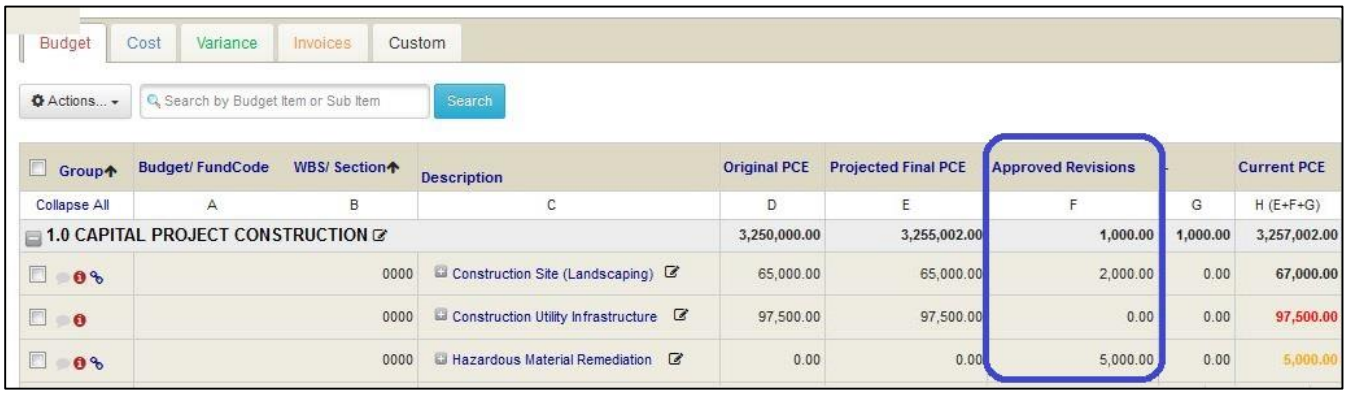
4. Complete the necessary fields in the Transfer To tab.
5. Click SAVE.



6. To begin the approval process, click START APPROVAL.

- Once the Finance & Treasury Controller approves the CBT in Projectmates and updates the FRS, the Facilities Project Manager will receive an automatic email notification and should update the PCE in the budget module.

PCE & Cost Tracking Tab > PCE & Contract Mgmt > Budget



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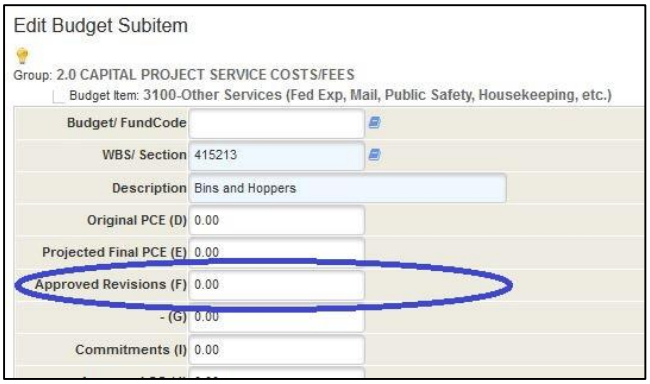
1. Make any necessary changes/updates for any PCE line item in the CBT form. Click SAVE.

   Enter positive or negative values into "Approved Revisions "

   A confirmation will appear
   Item saved successfully

2. Close the Edit window and repeat with other subitems as necessary.


Edit Budget Subitem
Group: 2.0 CAPITAL PROJECT SERVICE COSTS/FEES
Budget Item: 3100-Other Services (Fed Exp, Mail, Public Safety, Housekeeping, etc.)
Budget/ FundCode
WBS/ Section 415213
Description Bins and Hoppers
Original PCE (D) 0.00
Projected Final PCE (E) 0.00
Approved Revisions (F) 0.00
- (G) 0.00
Commitments (I) 0.00

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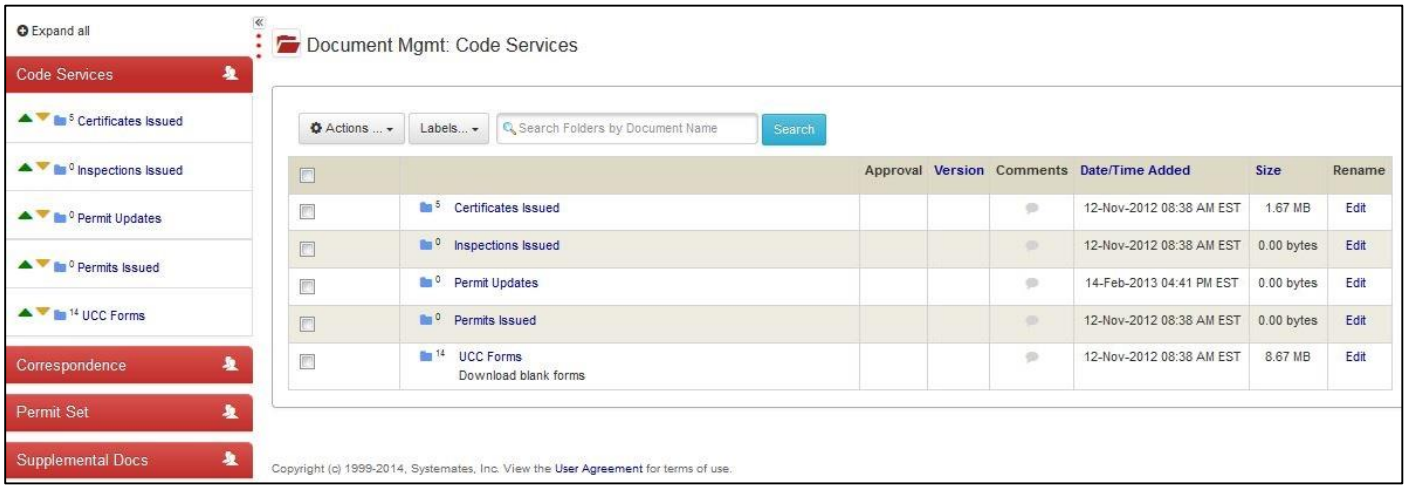
8. Code Services

Code Services Documents

Documents > Construction > Code Services



Plan Review / Permit Submittal

Code Services Tab > Plan Review / Permit Submittal

MSU Workflow

- Facilities Project Manager completes the **Plan Review and/or Permit Submittal** form in the appropriate thread.
- Code Services completes the **Project Review Response** on the same form.

1) Office of Code Compliance - DCA

Project Manager Responsibilities:

1. **Create the Plan Review/Permit Submittal Form**
   - Select “Create new item” under the appropriate thread (Building, Electrical, Elevator, Fire, or Plumbing).

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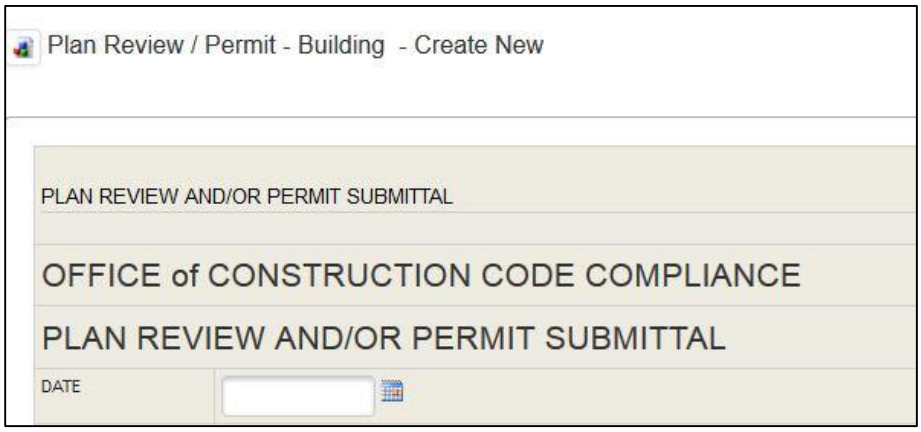
Quick Links
Documents
My Team
Tasks
Construction Mgmt
PCE & Cost Tracking
Code Services
Bidding
Misc
Admin
All Projects
Plan Review / Permit Submittal
Inspection Request
Ongoing Inspections
Construction Official
Plan Review / Permit - Building
Plan Review / Permit Submittal Log
Create new item
Plan Review / Permit Submittal
The Plan Review / Permit Submittal form is completed by the Facilities Project Manager and routed to the Department of Code Services. Upon completion of the review or perm
Official shall issue response within the Project Review Response form.
Copyright (c) 1999-2014, Systemates, Inc. View the User Agreement for terms of use.

2. **Complete the Plan Review and/or Permit Submittal**
   - Fill out all relevant fields.
   - Click Save at the bottom of the form.
   - Click Start Approval


Plan Review / Permit - Building - Create New
PLAN REVIEW AND/OR PERMIT SUBMITTAL
OFFICE of CONSTRUCTION CODE COMPLIANCE
PLAN REVIEW AND/OR PERMIT SUBMITTAL
DATE

3. **Approve or Reject the Request**
   - Check the box next to your name.
   - Click “Approved” or “Rejected”.

4. **Start Default Approval Process for the Response & Send Notification to Code Official**
   - After the Plan Review and/or Permit Submittal form has been approved, the Project Review Response form will appear below it.

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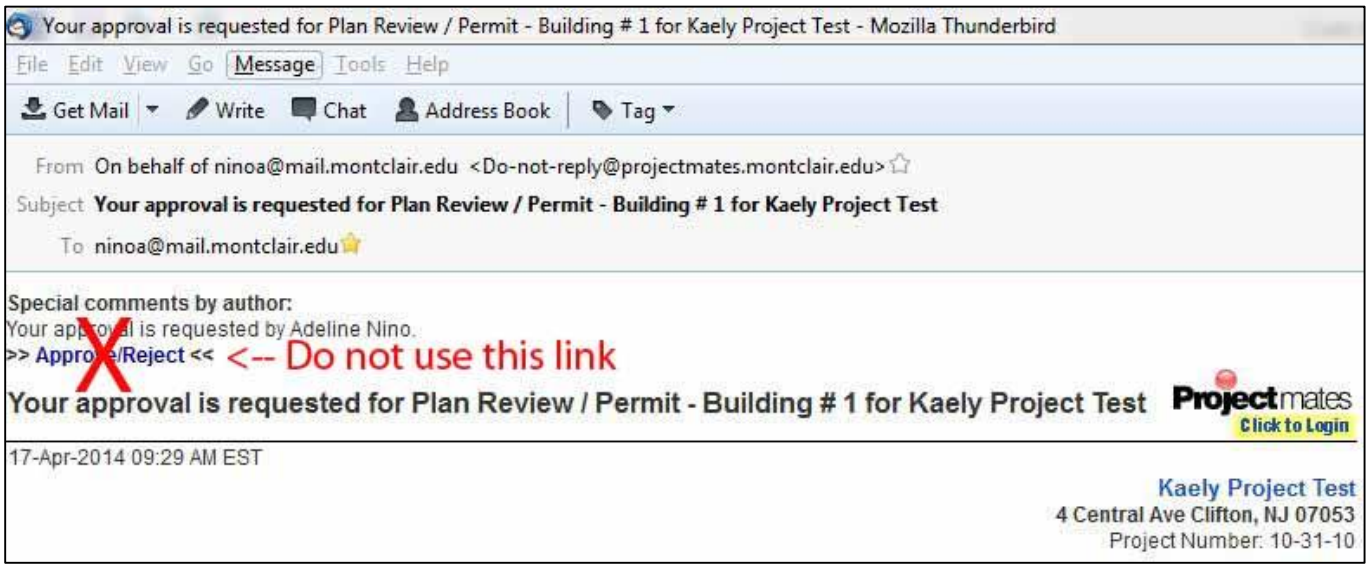
- In order to trigger the notification email to the appropriate Code Official, the Project Manager must click Start Approval at the bottom of the form. (There is a note in **blue text** at the bottom of the previous form to remind you of this.)

Code Official Responsibilities:

1. **Receive Notification Email**
   - Code Officials will receive an email from Projectmates.
2. **Log in and find the new request**
   - Go to https://projectmates.montclair.edu/ and log in.
   - Do not try to use the Approve/Reject link that is in the email.


Your approval is requested for Plan Review / Permit - Building # 1 for Kaely Project Test - Mozilla Thunderbird
File Edit View Go Message Tools Help
Get Mail Write Chat Address Book Tag
From On behalf of ninoa@mail.montclair.edu <Do-not-reply@projectmates.montclair.edu>
Subject Your approval is requested for Plan Review / Permit - Building # 1 for Kaely Project Test
To ninoa@mail.montclair.edu
Special comments by author:
Your approval is requested by Adeline Nino.
>> Approve/Reject <<
<-- Do not use this link
Your approval is requested for Plan Review / Permit - Building # 1 for Kaely Project Test
Projectmates
Click to Login
17-Apr-2014 09:29 AM EST
Kaely Project Test
4 Central Ave Clifton, NJ 07053
Project Number: 10-31-10

   - Find and open the project.
   - Navigate to the Code Services Tab and then the Plan Review/Permit Submittal Log under the appropriate thread. (New items can also be found under the My Work Tab.)
   - Find the Request and click “Edit” on the right.
3. **Complete the Response.**
   - Fill in the appropriate fields of the form.

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- Click

4. **Approve or Reject the Response:**
   - Click

   - Check the box next to your name.
   - Enter comments or certifications, if you have them.
   - Click Approved or Rejected.

5. **Email the form**
   - Once it has been Approved or Rejected, it does not automatically send a notification email.
   - Go to the top of the form and click the icon to email the form.

   - A window will pop up that lists contacts for that project.
   - Check off the names of the people you want to send to.
   - Add other email addresses in the first text box.
   - Add comments, if you have any, in the second text box.
   - Click

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Inspection Requests & Responses

Code Services Tab > Inspections

MSU Workflow

- Facilities Project Manager completes the **Inspection Request** form.
  - Upon completion, select the appropriate Inspector to notify.
  - Director of Code Services & Professional Service Specialist copied on all requests.

Project Manager Responsibilities:

1. **Create the Inspection Request Form**
   - Select "Create new item" under the appropriate thread (Building, Electrical, Elevator, Fire, or Plumbing)

Quick Links
Documents
My Team
Tasks
Construction Mgmt
PCE & Cost Tracking
Code Services
Bidding
Misc
Admin
All Projects
Plan Review / Permit Submittal
Inspection Request
Ongoing Inspections
Construction Official
Inspection Request - Building
Inspection Request Log
Create new item
Inspection Request
The Inspection Request form is completed by the Facilities Project Manager and routed to the Department of Code Services. Upon completion of the inspection, the Subcode Official s
inspection response within the Inspection Response form.
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2. **Complete the Inspection Request Form**
   - Fill out all relevant fields.
   - Click
Inspection Request - Building - Create New
Inspection Request Form
OFFICE of CONSTRUCTION CODE COMPLIANCE
INSPECTION REQUEST FORM
DATE of REQUEST

3. **Approve or Reject the Request**
   - Click

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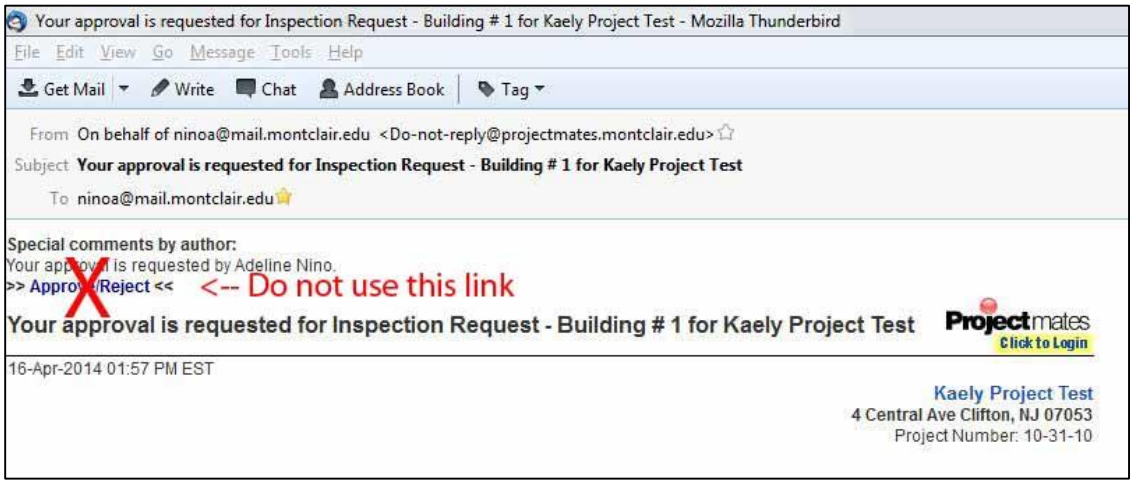
- Check the box next to the item you are approving.
- Enter comments or certifications, if you have any.
- Click “Approved” or “Rejected”.

4. **Start Default Approval Process for Inspection Response & Send Notification to Code Official**
   - In order to trigger the notification email to the appropriate Code Official, the Project Manager must click

in the Inspection Response. (There is a note in **blue text** at the bottom of the Request Form to remind you of this.)

Code Official Responsibilities:

1. **Receive Notification Email**
   - Code Officials will receive an email from Projectmates.
2. **Log into Projectmates**
   - Go to https://projectmates.montclair.edu/ and log in.
   - Do not try to use the Approve/Reject link that is in the email.


Your approval is requested for Inspection Request - Building # 1 for Kaely Project Test - Mozilla Thunderbird
File Edit View Go Message Tools Help
Get Mail
Write
Chat
Address Book
Tag
From On behalf of ninoa@mail.montclair.edu <Do-not-reply@projectmates.montclair.edu>
Subject Your approval is requested for Inspection Request - Building # 1 for Kaely Project Test
To ninoa@mail.montclair.edu
Special comments by author:
>> Approve/Reject <<
<-- Do not use this link
Your approval is requested for Inspection Request - Building # 1 for Kaely Project Test
Projectmates
Click to Login
16-Apr-2014 01:57 PM EST
Kaely Project Test
4 Central Ave Clifton, NJ 07053
Project Number: 10-31-10

3. **Open the Project & Find the Request**
   - Navigate to the Code Services Tab and then the Inspection Request Log under the appropriate thread. (New items can also be found under the My Work Tab.)
   - Find the Request in the log and click Edit on the right.

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4. **Complete the Response Form**
   - Fill in the appropriate fields of the form.
   - Click Save
5. **Approve or Reject the Inspection Response:**
   - Click Start Approval
   - Check the box next to your name.
   - Enter comments or certifications, if you have them.
   - Click Approved or Rejected.

6. **Email the form**
   - Once it has been Approved or Rejected, it does not automatically send a notification email.
   - Go to the top of the form and click the icon to email the form.

   - A window will pop up that lists contacts for that project.
   - Check off the names of the people you want to send to.
   - Add other email addresses in the first text box.
   - Add comments, if you have any, in the second text box.
   - Click Send

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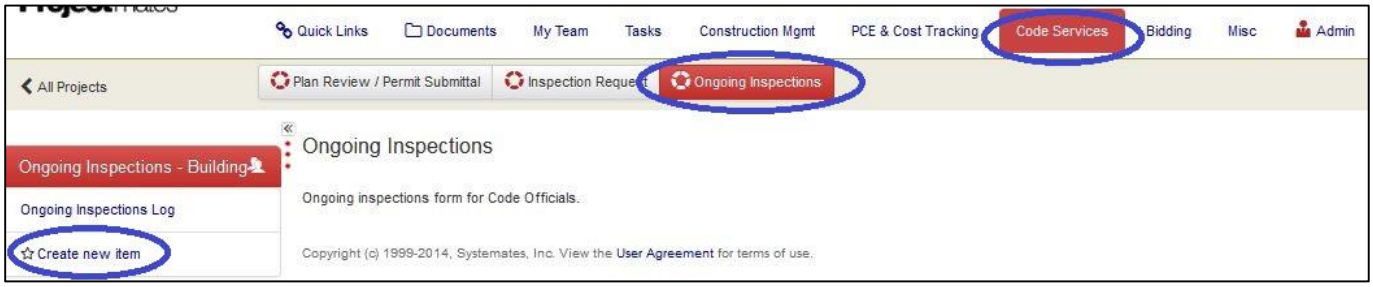
Ongoing Inspections

Code Services Tab > Ongoing Inspections

Ongoing Inspections are initiated by the Code Official and do not require the Project Manager to submit a request.

Code Official Responsibilities:

1. Navigate to the Code Services Tab, select Ongoing Inspections and, under the appropriate thread, select Create new item.



2. **Complete the form**
   - Fill in the appropriate fields of the form.
   - Click Save
   - Click Start Approval

3. **Approve or Reject the form:**
   - Check the box next to your name.
   - Enter comments or certifications, if you have them.
   - Click Approved or Rejected.

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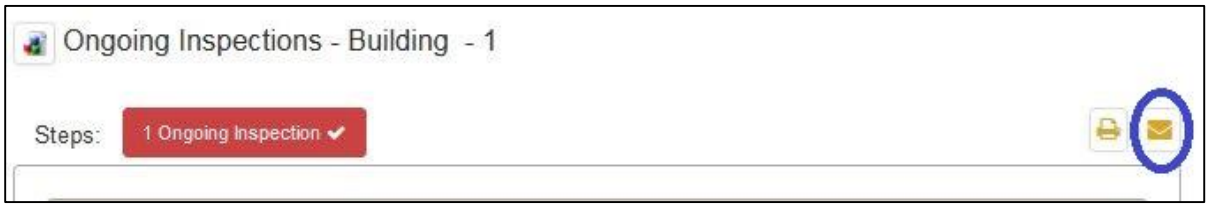
4. **Email the form**
   - Once it has been Approved or Rejected, it does not automatically send a notification email to the Project Manager.
   - Go to the top of the form and click the icon to email the form.



- A window will pop up that lists contacts for that project.
- Check off the names of the people you want to send to.
- Add other email addresses in the first text box.
- Add comments, if you have any, in the second text box.
- Click

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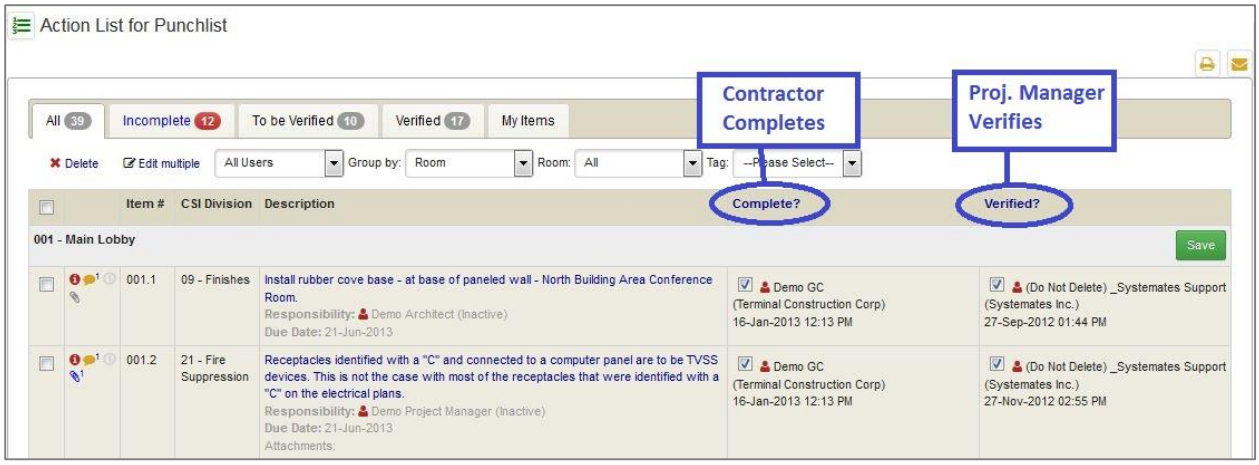
9. Project Closeout

Punch List

Tasks Tab > Action List > Punchlist

The list of project rooms should be extracted from Archibus prior to project closeout. This list of rooms will be uploaded into Projectmates punchlist module. A list of all CSI divisions are already populated in the project. From here, the Project Manager can develop the punchlist while walking the jobsite.



- Click on the punch list menu on the left pane.
- From the Log, you can easily view complete items and also those awaiting verification.
- GC will mark items **Complete.**
- The Project Manager or other authorized person will then check off as items are **Verified**.

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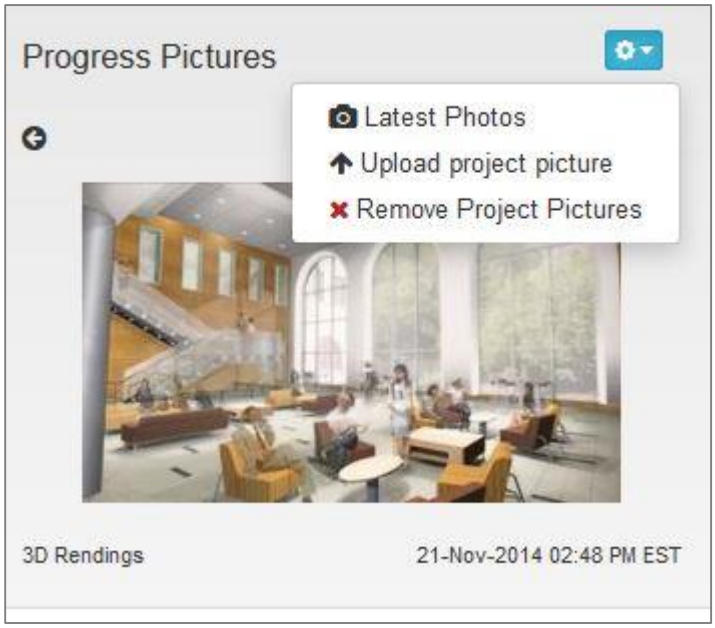
10. Other Goodies

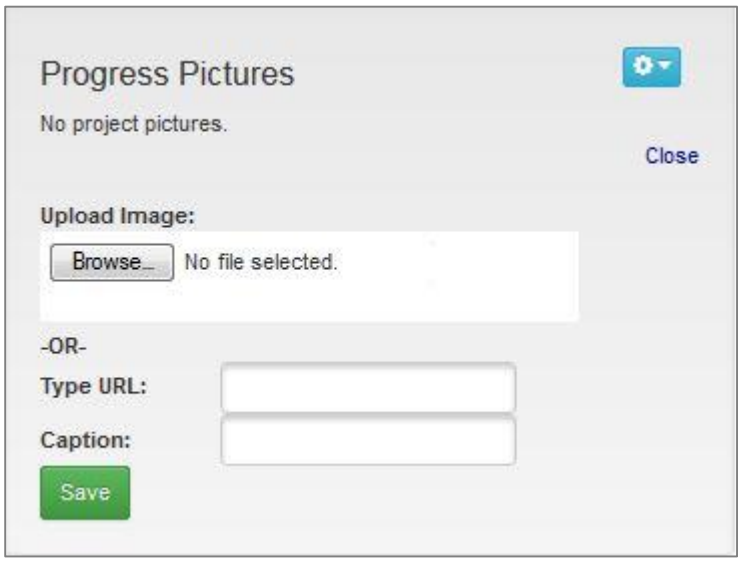
Progress Pictures on Project Home Page

Show the latest and greatest picture on the Project Home Page.

- From the project Home Page, the Project Manager can upload and remove progress photos.
- Click the menu in the upper right of the Progress Pictures box. And select Upload project picture.



- Browse for the photo.
- Add a caption.
- Click Save



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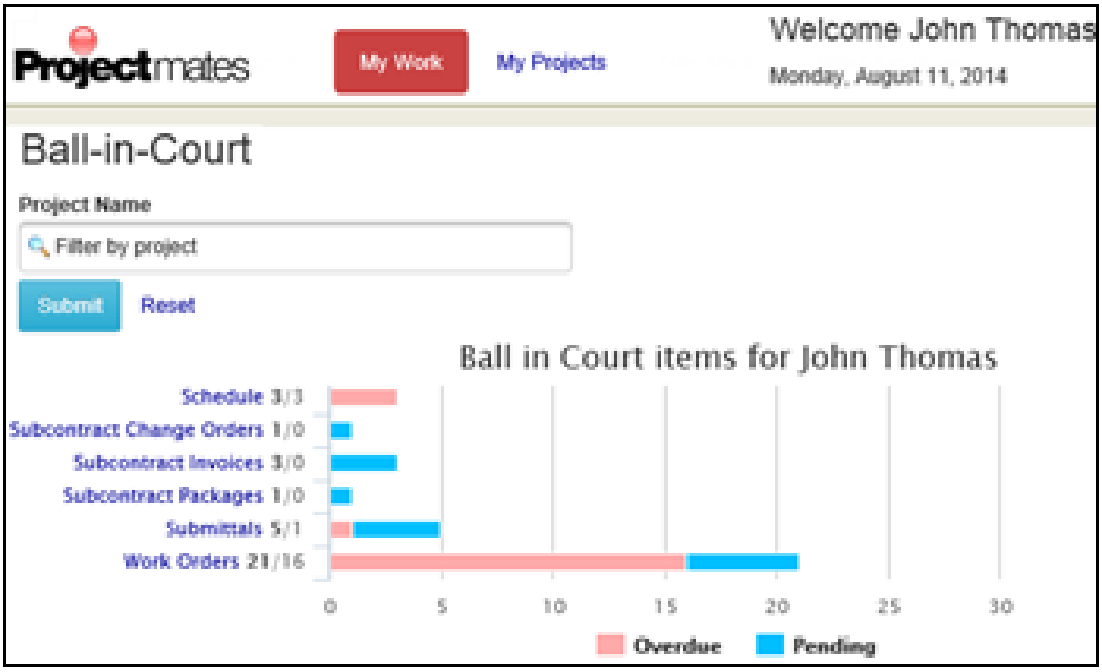
Global Ball in Court

For users working in multiple projects, Projectmates offers a “Global Ball in Court,” which is a dashboard view of action items and deadlines for all current projects. Inside Global Ball in Court, you can filter items by project or by type, and then respond to them with a minimal amount of clicks. These items are color coded to help you easily differentiate between items that are pending vs. overdue. For example, a Project Manager may have many invoices that require his or her approval; s/he would be able to view and approve numerous invoices across multiple projects with just a few clicks. If needed, s/he can drill down into an item to review it further.



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